CITY OF MEMPHIS



Training Objectives

The Three Laws of the System

ORACLE EMPLOYEE

SELF-SERVICE

TRAINING

Intro to CMEM E-Business Suite

CMEM Employee Self-Service

5 HRSS Training Exercise

Oct 8 - Dec 19, 2012

City Of Memphis

Oracle Self-Service Training



CMEM Employee Self-Service



Presented by CMEM Human Resources Division

Contents

Introduction to the CMEM E-Business Suite	vii
E-Business Suite Home Page	x
CMEM EMPLOYEE SELF-SERVICE	1
ESS1 – Personal Information	2
1.1 - View Basic Details	
1.2 – Add/Update Phone Numbers	
1.3 – Update Main Address	
1.4 – Emergency Contact	
1.5 – Additional Contacts	
ESS2 – My Information	11
2.1 – View My Information	11
ESS3 – Benefits	12
3.1 – View Benefits Enrollment	12
3.2 – View Current Benefits	
ESS4 – Employee Tax Form W2	14
ESS5 – Employee Tax Form W4	
5.1 – Update	
5.2 – Exempt Status	16
ESS6 - Payslip	18
6.1 – View Payslip	18
ESS7 – Worklist Notifications	19
7.1 – View Notifications	19
7.2 - View/Apply Worklist Notification Actions	20
ESS8 – Competence Profile	23
8.1 – View/Update Employee's Competence Profile	23
8.2 – Adding Competencies	
8.3 – New Levels Attained	24
ESS9 – Education and Qualifications	28
9.1 – View Education and Qualifications	28
9.2 – Add Education and Qualifications	28
EXER1 – Employee HRSS Training Exercise	31
1.1 - Employees' Personal Information	31
1.2 - Competencies and Education Qualifications	

Training Objectives

After completing this training, you should be able to do the following:

- Understand how the Human Resources system works
- · Learn the "Three Laws" for the new system
- · Recognize what information can be viewed and updated
- Perform hands-on activities on the computer

Benefits of the Human Resources Oracle System:

The new system will allow employees to review and update personal information.

Employees will be able to access **the new system** from any computer in the office.

Managerial employees can approve paperwork online using **the new system**



The Three Laws of Oracle Self-Service



Do not use the "Internet Browser Back Button"

2.

Do not enter "Post Office Box Addresses"

3.

Managers – If an action is rejected "Enter the Reason"

Introduction to the CMEM E-Business Suite

Alternative # 1: Using any CMEM computer connected to the Internet

- Go to www.memphistn.gov if applicable
- Click on the **Employee Self-Service** link

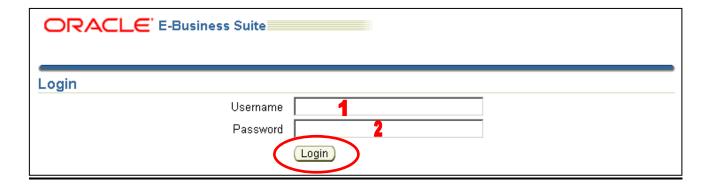


Alternative # 2: Using the Kiosks located throughout the Division.

You are already in the Oracle Human Resources Self-Service home page.



How to Login in the System



- From the Login page, enter:
 - 1. Username
 - 2. Password
- Click on the Login button.

TRAINING PLAYGROUND

Username: Employee System Username (Jimmy.Brown)

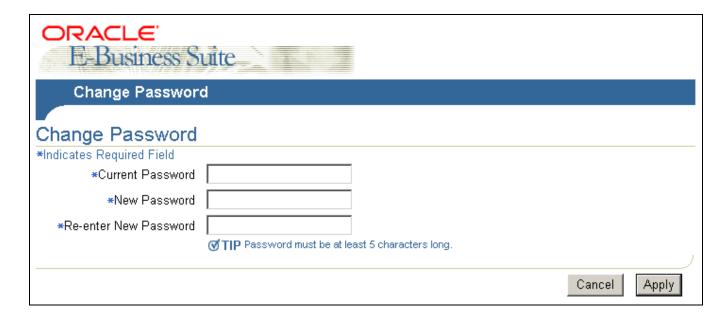
Password: Your Oracle system login

If this is your first time or you forgot your current password, you will need to call the CMEM Service Desk 636-6100 to reset the password. Then you will need to create a new password.

Tips for creating good passwords:

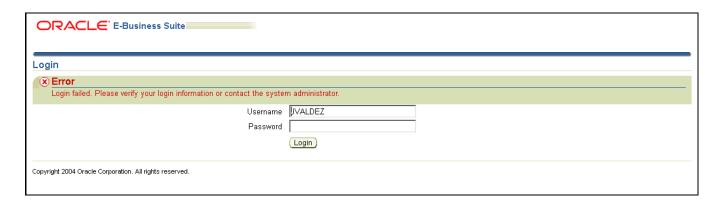
- It needs to contain special characters such as @#\$%^&
- It must be at least 8 characters long.
- It must not have any common words such as 123, password, your birth date, your login name and any words that can be found in the dictionary.
- a variation of capitalization and small letters

How to Change a Password

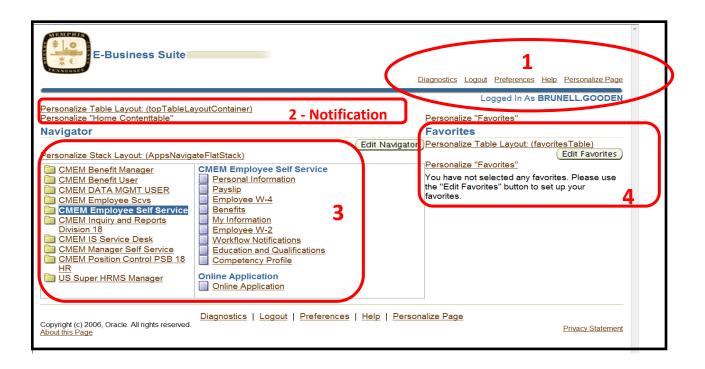


- 1. Enter current Password
- 2. Enter New Password
- 3. Re-enter New Password
- 4. Click on Apply button

If you type the wrong password, you will be prompted to the next screen:



E-Business Suite Home Page



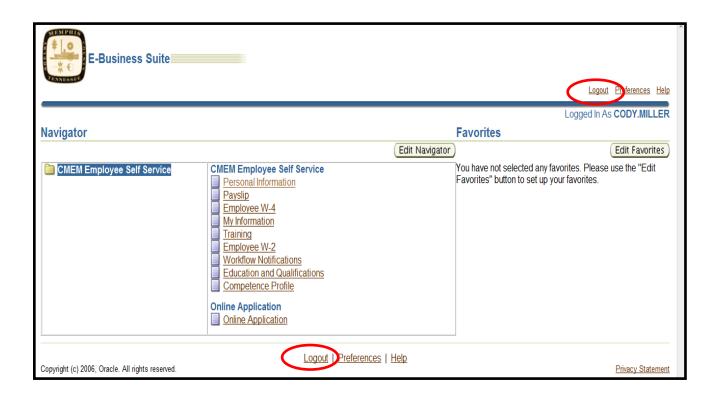
- 1. **Global Menu Area** this menu appears on every page.
- 2. **Notification Area** Important messages will be displayed here
- 3. Navigation Area This is where you access the application
- 4. **Favorites Area** Here you can create quick links to your favorite web pages and menus.



Do not use the "internet browser" back button

How to Logout of the System:

1. From any menu, click on Logout



2. You will exit the system and return to the sign on screen.

Introduction to the CMEM E-Business Suite

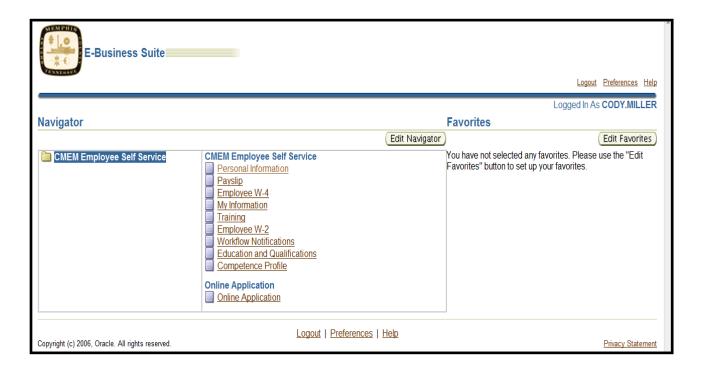
Summary

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CMEM EMPLOYEE SELF-SERVICE

Home Page

➤ Click on **CMEM Employee Self-Service** to view all functions

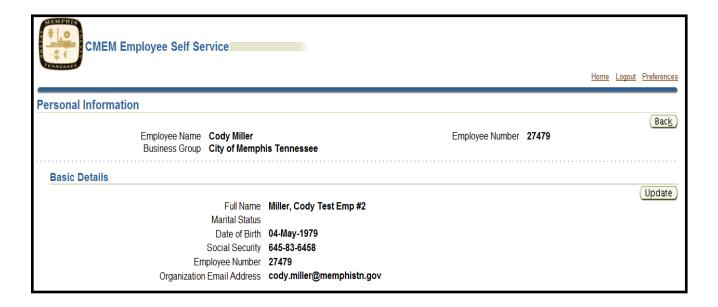


View Only	Ability to Update		
 Basic Detail (SSN, Date of Birth) My Infoormation Benefits (Except during Open Enrollment) IRS Form W2 CMEM Pay Slip 	 ➢ Personal Information ❖ Basic Detail – Name ❖ Basic Detail – Marital Status ❖ Basic Detail – Main Address ❖ Basic Detail – Emergency Contact ❖ Basic Detail – Additional Contact 		
	 IRS Form W4 Competence Profile Education and Qualifications 		

ESS1 – Personal Information

Law No. 2 Do not use Post Office Box addresses

1.1 - View Basic Details



- 1. Click on CMEM Employee Self Service
- 2. Click on Personal Information
- **3.** Verify if your personal information is correct.
 - Full name
 - Marital status
 - Date of birth
 - Social security
 - Employee number
 - Email address
- 4. Click on Back button

1.2 – Add/Update Phone Numbers

Note: This data is for testing only, No changes will affect your real data in production

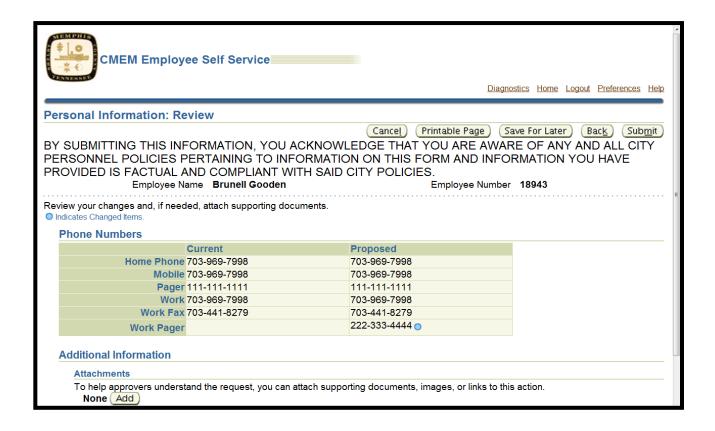


- 1. Click on CMEM Employee Self Service
- 2. Click on Personal Information
- 3. Under the Phone Numbers section click "Add (for new record) & Update (for existing record)" button.



- 4. Click on Add Another Row button
- 5. Select Work Cell type from drop down list of values
- **6.** Enter Number in text box
- 7. Click on "Next" button

Review Page



- **8.** Review your proposed changes
- 9. Click on "Submit" button

Confirmation Page

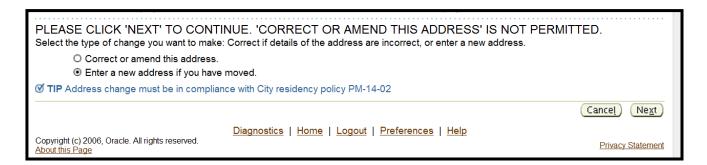


- **10.** Click on "Return to Overview" button to confirm changes.
- **11.** Click on "Home" Link to return to Home page.

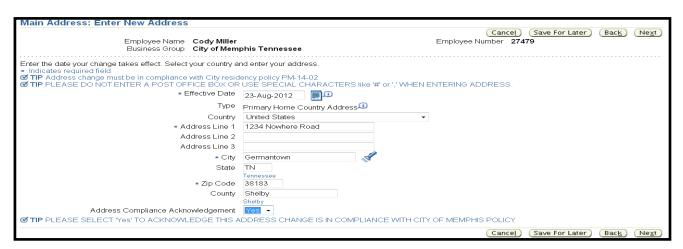
1.3 – Update Main Address



- 1. Click on CMEM Employee Self Service
- 2. Click on Personal Information
- 3. Under the Main Address section click "Update" button.
- 4. Note: Correction or Amendment is not permitted



- 5. Select the Enter a new address if you have moved Radio Button
- 6. Click on "Next" button
- **7.** Enter new address



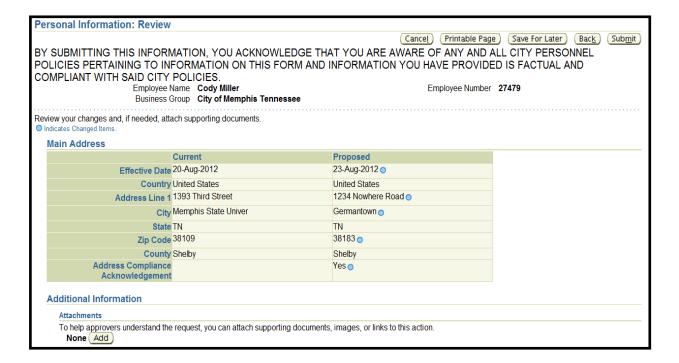


8. Click [Tab] on the keyboard or on the flashlight icon

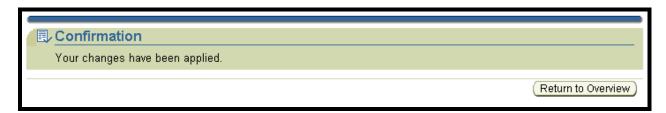
in order to search for your city name from list of values



- 9. Select the proper city and zip code by clicking the radio button. Then click on the "Select" button.
- 10. Click on "Next" button
- **11.** You are prompted to a review page.



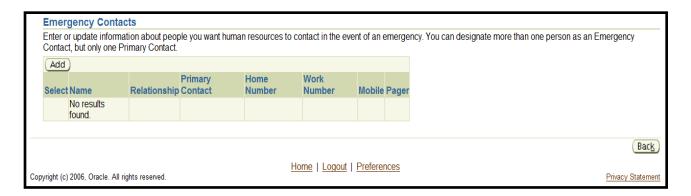
- **12.** Review your proposed changes
- 13. Click on "Submit" button



- 14. Click on "Return to Overview" button to view your changes
- **15.** Click on "Home" link to return to home page

1.4 – Emergency Contact

- 1. Click on CMEM Employee Self Service
- Click on **Personal Information**
- 3. Under the Emergency Contacts section click on "Update or Add" button if no contact is listed



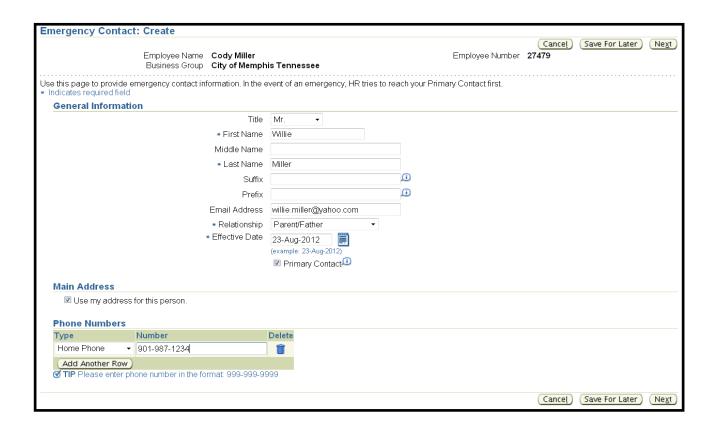
4. Click "Add" (Note: do not select from the list if entering a new contact)



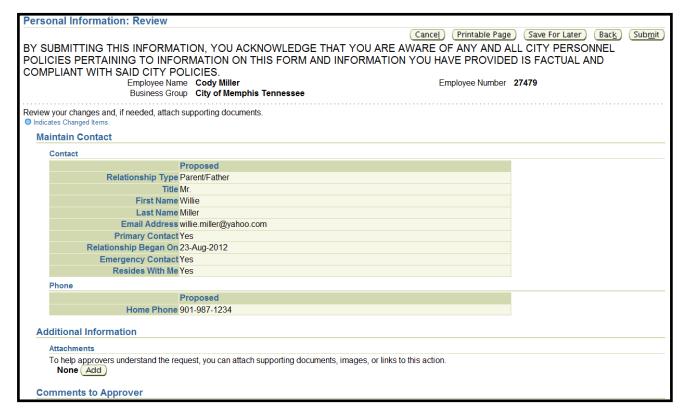
- 5. Click "Continue"
- **6.** Input required information (indicated by an asterisk (*) in the fields
 - First and Last name (middle name optional)
 - Relationship
 - Effective Date
- 7. Click if this person will be your primary contact
- **8.** Add a phone number
- 9. Click "Add Another Row" if necessary
- 10. Click "Next"

MLGW

Diagnostics Home Logout Preferences



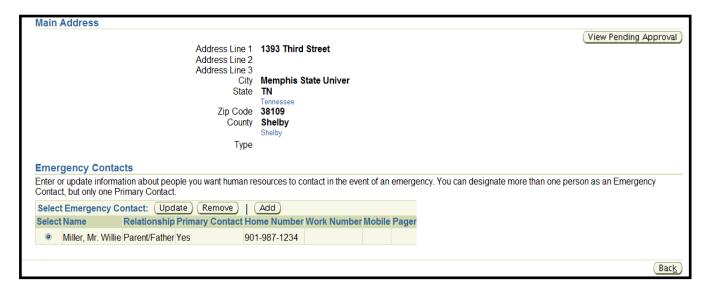
11. Review your changes/updates



12. Click "Submit"



- 13. The updated changes will be placed in a View Pending for Approval hold status when you return to the Home Page
- 14. Updated Emergency Contact will be updated with additional selection options (Update, Remove & Add)

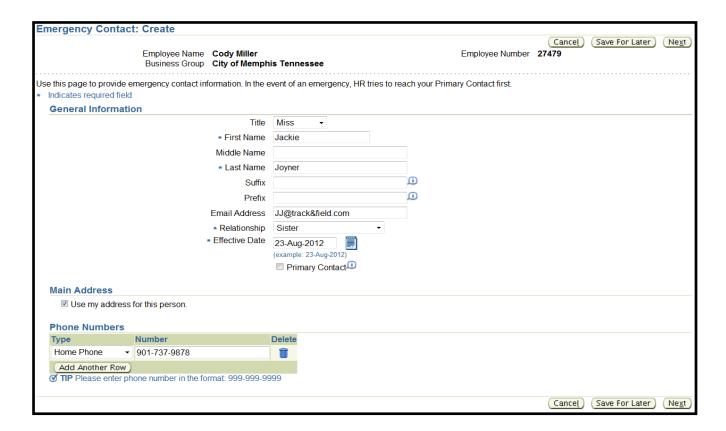


1.5 - Additional Contacts

- 1. Click on CMEM Employee Self Service
- 2. Click on Personal Information
- 3. Under the Select Emergency Contact click the "Add" button, and then "Continue"
- **4.** Input the new contact information
- **5.** Enter information in the fields
 - First Name
 - Middle Initial
 - Last Name
 - Email Address
 - Relationship
 - Relationship Start Date

Note: You can enter any number of contacts but only one (1) can be your "Primary Contact"

- **6.** Uncheck the box "Use my address for this person" if the person has another address
 - Enter contact new address information
 - *** Remember DO NOT TYPE State, Zip Code and County; this data is auto populated ***
- 7. Click "Next" or "Save for Later"



- **8.** Review your changes/updates on the review page
- 9. Click "Submit"

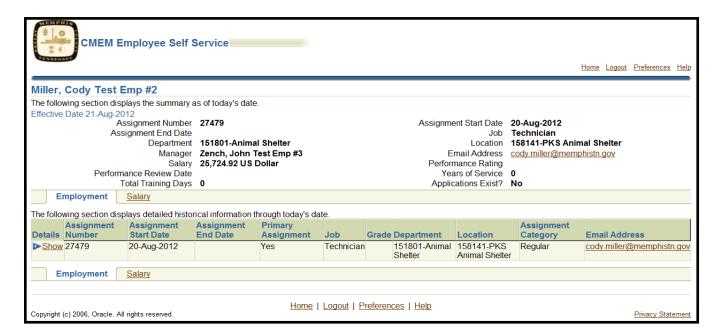


10. Click "Return to Overview" to return to Home Page

ESS2 – My Information

2.1 – View My Information

- 1. Click on CMEM Employee Self Service
- 2. Click on My Information



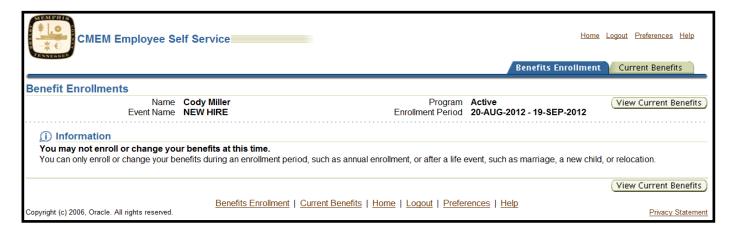
- 3. Click on "Salary Tab"
- **4.** Click "Home" to return to home page

ESS3 – Benefits

3.1 – View Benefits Enrollment

- 1. Click on CMEM Employee Self Service
- 2. Click on Benefits Enrollment

Note: CMEM Benefits update features are not permitted outside of the Open Enrollment period



3.2 – View Current Benefits

1. Click on View Current Benefits tab or button

Verify your Current Benefits - Covered Dependents - Beneficiaries



View Covered Dependents

Plan	Option	Coverage Start Date	Dependent	Relationship	Social Security Number
Medical - City of Memphis Premier Pre-Tax	Family	01-Oct-2012	Jill Miller	Child	345-67-8987
		01-Oct-2012	Jim Miller	Child	906-89-7567
		01-Oct-2012	Jack Miller	Foster Child	234-45-6789
		01-Oct-2012	Walk Miller	Legal Custody Child	901-10-1009
Dental - Dental Premier Pre-Tax	Family	01-Oct-2012	Jill Miller	Child	345-67-8987
		01-Oct-2012	Jim Miller	Child	906-89-7567
		01-Oct-2012	Jack Miller	Foster Child	234-45-6789
		01-Oct-2012	Walk Miller	Legal Custody Child	901-10-1009
Vision - Vision Pre-Tax	Family	01-Oct-2012	Jill Miller	Child	345-67-8987
		01-Oct-2012	Jim Miller	Child	906-89-7567
		01-Oct-2012	Jack Miller	Foster Child	234-45-6789
		01-Oct-2012	Walk Miller	Legal Custody Child	901-10-1009
Life Insurance (For Your Spouse and Dependents) - Life Dep		01-Oct-2012	Jill Miller	Child	345-67-8987
		01-Oct-2012	Jim Miller	Child	906-89-7567
		01-Oct-2012	Jack Miller	Foster Child	234-45-6789
		01-Oct-2012	Walk Miller	Legal Custody Child	901-10-1009

View Beneficiaries

Plan	Option	Beneficiary	Relationship	Social Security Number	Primary %	Contingent %
Life Insurance (For You) - Life Employee Contr Pre-Tax		Walk Miller	Legal Custody Child	901-10-1009	100	0
ife Insurance (For Your Spouse and Dependents) - Life De)	Cody Miller	Self	645-83-6458	100	0
			5 / 0/7/	201.15.2700		
Death Benefits Free (For You) - Death Benefit		Jack Miller	Foster Child	234-45-6789	100	0
Beneficiary Only - Final Pay Beneficiary		Employee's Own Trus	st Third Party		100	0

2. Click on the "Home" button when completed viewing

ESS4 – Employee Tax Form W2

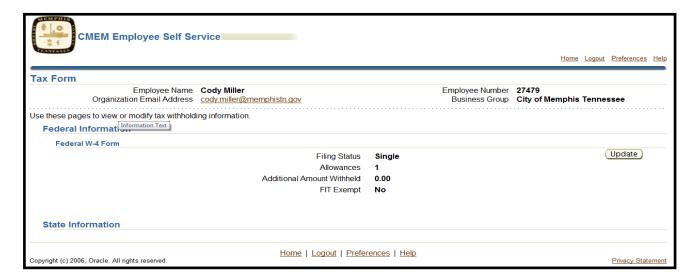
Note: CMEM Form W-2 and Tax Statement features are not permitted. Forms will be mailed.



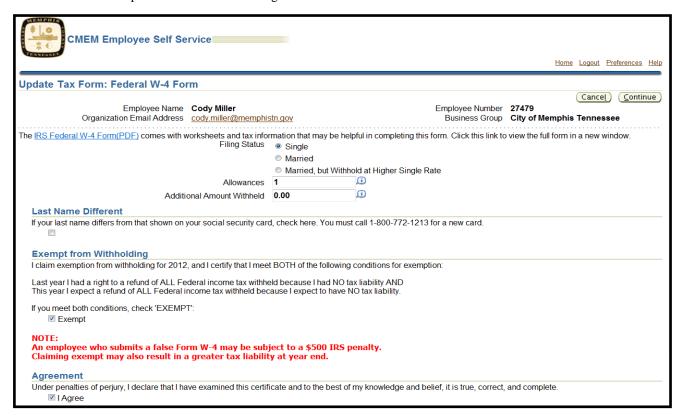
ESS5 - Employee Tax Form W4

5.1 – **Update**

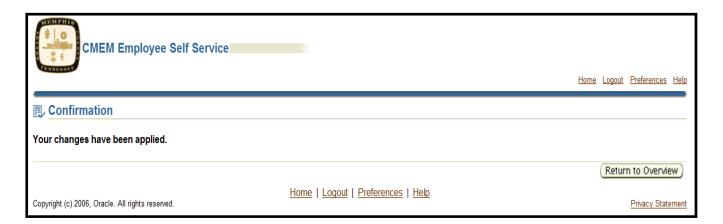
- 1. Click on CMEM Employee Self Service responsibility
- 2. Click on Employee W-4
- **3.** Verify the data on this Federal form before making changes



4. Click on Update button to make changes



- 5. To change your Filing Status, click on the appropriate radio button
- **6.** To change the number of **Allowances**, enter an appropriate number
- 7. To have an Additional Amount With-held, enter an appropriate amount
- **8.** You must select the "I Agree" checkbox.
- 9. Click "Continue"
- **10.** Review the changes
- 11. Click "Submit"
- **12.** Click on **Return to Overview** to view changes



5.2 – Exempt Status

- 1. Click on CMEM Employee Self Service responsibility
- 2. Click on Tax Form
- **3.** Click on Update button to make changes
- **4.** To change your status to exempt select the "Exempt" check box

Exempt from Withholding

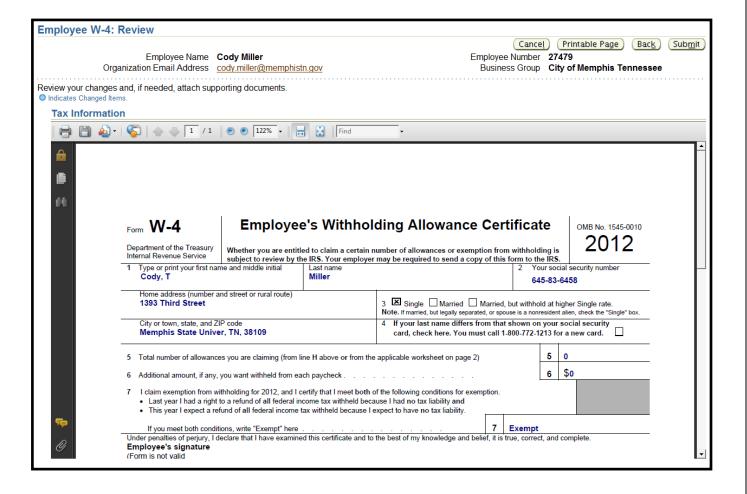
I claim exemption from withholding for 2006, and I certify that I meet BOTH of the following conditions for exemption:

Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability AND This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

If you meet both conditions, check 'EXEMPT':

☑ Exempt

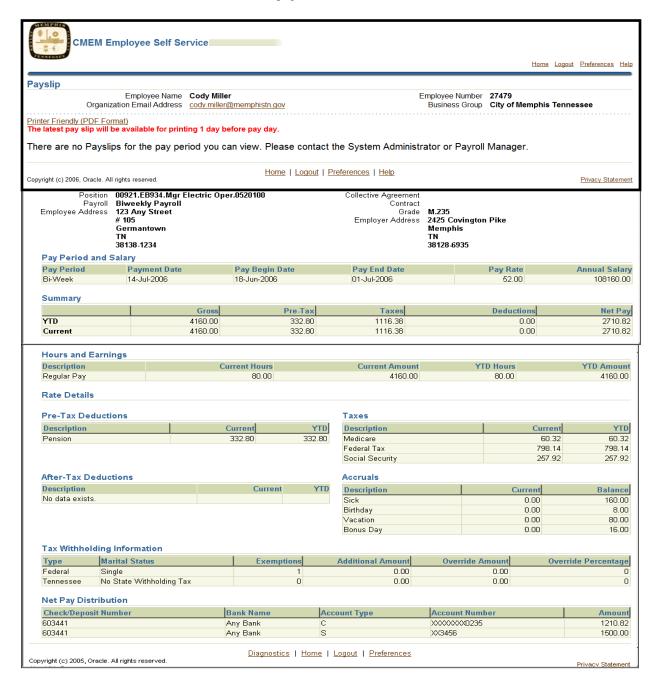
- **5.** You must select the "I Agree" checkbox.
- 6. Click "Continue"
- **7.** Review the changes
 - Note: CMEM Finance Division will accept W-4 without signature if submitted within Oracle HRSS



ESS6 - Payslip

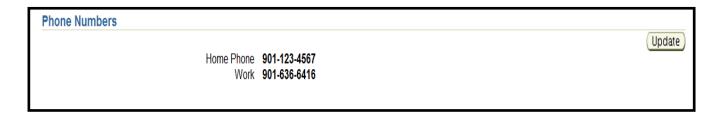
6.1 - View Payslip

- 1. Click on CMEM Employee Self Service responsibility
- 2. Click on Payslip
- 3. Scroll down and view details (Note: Ms. Miller has not been hired long enough to have received her first paycheck)
- **4.** Click on "Home" link to return to home page



ESS7 – Worklist Notifications

7.1 – View Notifications



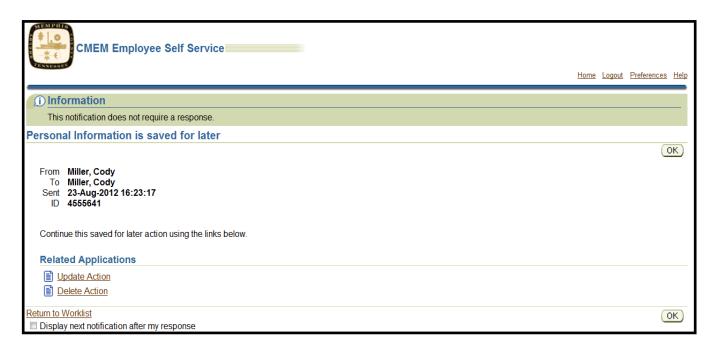
- 1. Click on CMEM Employee Self Service
- 2. Click on Personal Information
- **3.** Under the **Phone Numbers** section click "**Update**" button.



- 4. Click on "Add Another Row" button
- **5.** Select a phone type from drop down list of values
- **6.** Enter Number in text box
- 7. Click on "Save for Later" button.
- 8. Click on "OK" button



9. Under work list Click on a Subject



- **10.** View notification
- 11. Click "OK"

7.2 – View/Apply Worklist Notification Actions

Use this procedure to complete Employee Self Service activities that have been started, but remain unfinished.

Many of the windows accessed through *Employee Self-Service* display a "**SAVE FOR LATER**" button. Use the button to freeze and store an in-process activity, and return to complete it later. In this example, adding a phone number was halted in mid-process, and the entry is now being resumed.

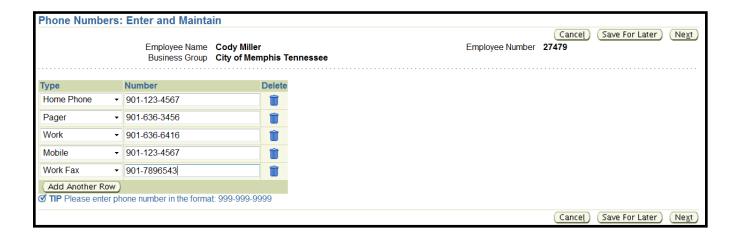
- 1. Click on CMEM Employee Self Service
- 2. Click on View Workflow Notifications



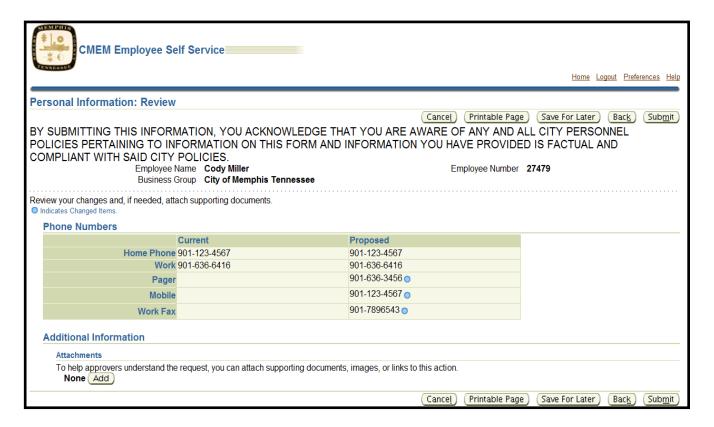
- **3.** If more than one activity is listed as Actions Saved for Later, select the radio button to the left of your choice, and click the open button
- 4. Click on "Update Action" link



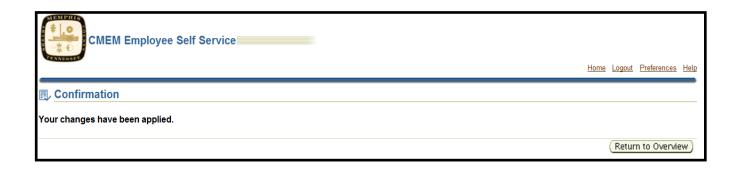
- **5.** Review your proposed changes
- **6.** Clink the "Next" button



- **7.** Review your proposed changes
- 8. Click on "Submit" button
- 9. After submitting your changes you will received a confirmation notice that your changes has been applied



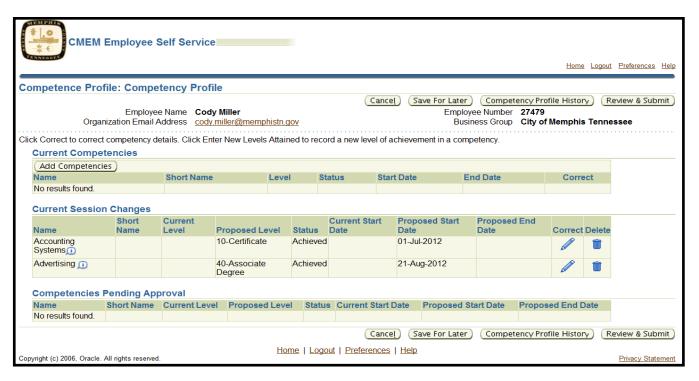
- **10.** Click on "Return to Overview" button to confirm changes.
- **11.** Click on "Home" Link to return to Home Page



ESS8 – Competence Profile

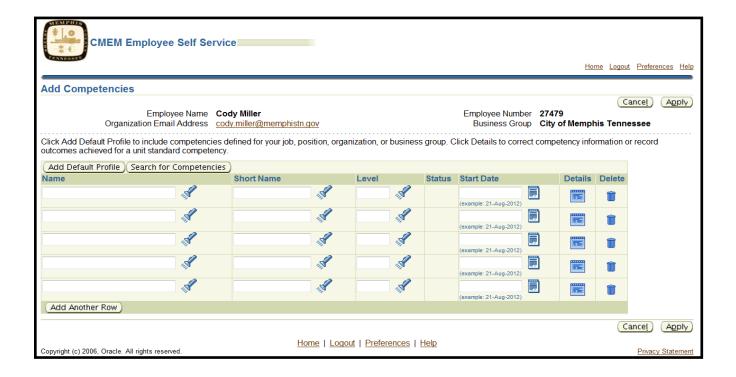
8.1 – View/Update Employee's Competence Profile

- 1. Click on CMEM Employee Self Service
- 2. Click on Competence Profile
- **3.** View Your Competence Profile
- 4. Click on "Add Competencies or New Levels Attained"

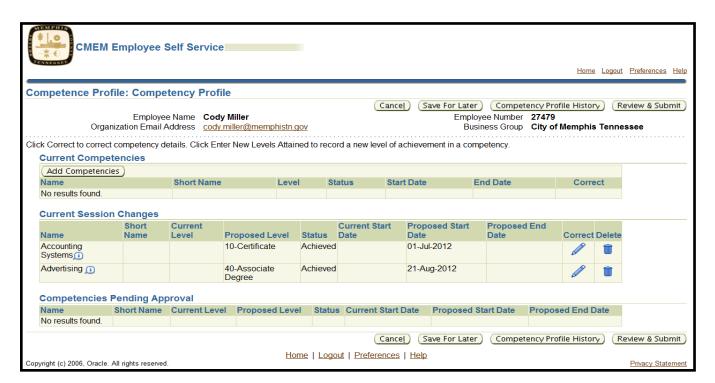


8.2 – Adding Competencies

- 1. After selecting the Add Competencies button
- **2.** The next screen will be prompt you for the following methods of input:
 - a. Add Default Competencies Profile (has to be set-up at various levels, i.e., Divison, Service Center or Position)
 - b. Search tab for Competencies
 - c. Activate the search icon (flashlight)
- **3.** Each competencies profile should have the following entries:
 - a. Name of Competencies
 - b. Level (if applicable)
 - c. Status (auto-populate)
 - d. Start date
- 4. When completed adding all competencies click the Apply button



- **5.** Review and submit updates
- **6.** Note: Changes are located in the Current Session Changes



8.3 – New Levels Attained

1. After selecting the "Competency Profile" button

- 2. Notice there is a "New Level Attained" tab; click on the new tab
- 3. Activate new level for previously established Competence(ies) select flashlight icon to select new level
- **4.** Input new desired level by selecting radio button

Note: Percent (%) sign is a wildcard which allow you to view categories of available selections



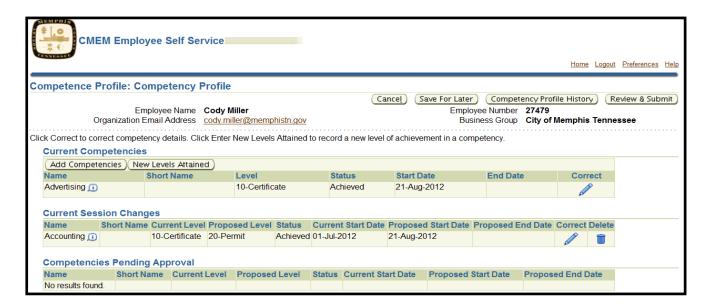
- **5.** Upon completion (change level from 10 to 20)
- **6.** Enter New Start Date which cannot be beyond current system date





7. Click "Apply"

- 8. The updates have been added to the Current Session Changes
- 9. Upon verification Click "Review & Submit"



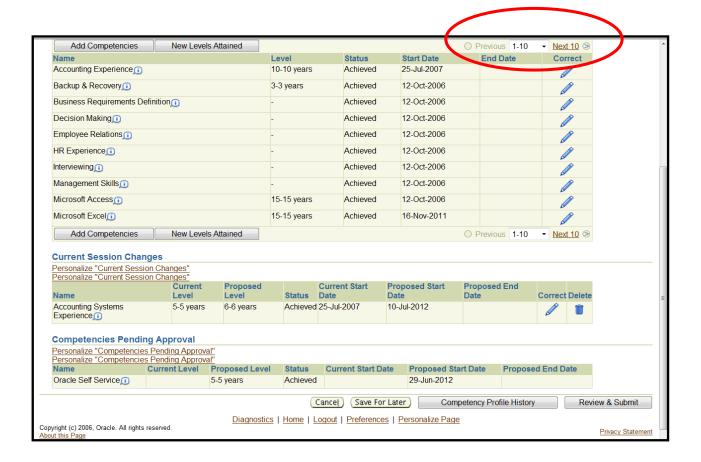
10. If satisfied with current updates click "Submit"



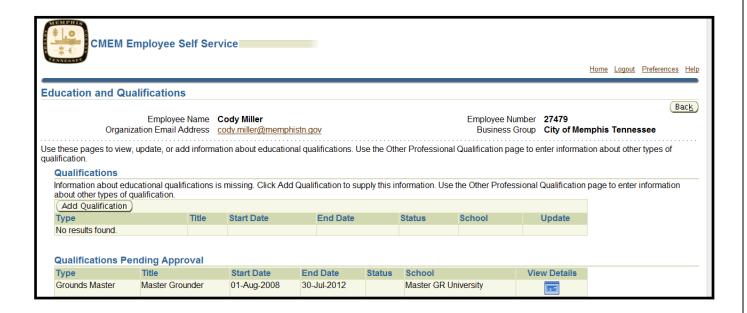
11. Confirmation of change(s) has been submitted to supervisor for approval



- 12. To view additional competencies click the directional arrow to view next five (5) records
- 13. Repeat steps 3 thru 10 above until all desired competencies are updated
- 14. Click the Apply button when completed selecting desired competencies



ESS9 - Education and Qualifications



9.1 - View Education and Qualifications

- 1. Click on CMEM Employee Self Service
- 2. Click on Education and Qualifications
- **3.** View educational background

9.2 - Add Education and Qualifications

- 1. Click on the Add Qualification button
- **2.** Enter the required data in the applicable field(s)
 - a. Qualification
 - b. School
 - c. Qualification Information
 - d. Subjects
 - e. Training Information
 - f. Comment
- 3. Click "Next"



- 4. Review the Education and Qualifications page, and click "Submit" when completed
- 5. Note: Alert to attach required supporting documents



- **6.** Confirmation of changes are pending for approval
- 7. Click the Home button to return to the functionality page



CMEM Employee Self-Service

Summary

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EXER1 – Employee HRSS Training Exercise

1.1 - Employees' Personal Information

- a. Update Employee Marital Status
- b. Update Home Phone Number, and add a Mobile, Fax and Work Numbers
- c. Update Main Address
- d. Add Emergency Contact
- e. View Payslip, and update W-4 to "exempt status"

1.2 - Competencies and Education Qualifications

- a. Add two (2) Employees' Competencies Basic PC Skills & job related skillset
- b. Add Qualification Bachelor or Master Degree, which every apply

Exercise Notes:	